

THE TORCH

Technology Tools To Enhance Productivity

The Torch is a handy directory to online tools and resources that can boost your productivity, and assist you with streamlining your business processes and practices.



Through Acrobat, people or businesses can create, edit, share, scan and sign digital documents so they can communicate and collaborate securely across devices.

Visit: <https://www.adobe.com/au/>



BankStatements technology provides a fast, frictionless web-based solution for the retrieval of bank statement data.

Visit: <https://www.bankstatements.com.au/>



BrokerEngine is mortgage broker specific CRM software, guaranteed to grow your revenue while working fewer hours, with push-button automation and workflows that free you up to focus on your highest-value activities.

Visit: <https://brokerengine.com.au/>



Calendly is your scheduling automation platform for eliminating the hassle of back-and-forth emails for finding the perfect time.

Visit: <https://calendly.com/>



CashDeck Credit Ready is a beautifully designed, simple to use tool that will help your clients provide you with their bank statements in a matter of seconds. As well as retrieving the bank statements you need, CashDeck will also gather up to 12 months of transaction data from all your client's accounts and provide you with a detailed analysis across all key spending categories.

Visit: <https://www.cashdeck.com.au/>



Creditsavvy locks your credit file.

Visit: <https://www.creditsavvy.com.au/>



Dashlane is a subscription-based password manager and digital wallet application.

Visit: <https://www.dashlane.com/>



Dragon allows you to speak into Word documents, web pages, Microsoft outlook, Word and almost every other application. The words will appear exactly where you were about to type them. Instead of typing, you talk into a microphone.

Visit: <https://www.nuance.com/en-au/dragon.html>



Dropbox is a home for all your work. You can store and share files, collaborate on projects, and bring your best ideas to life—whether you're working alone or with colleagues and clients. With Dropbox, all your files are backed up to the cloud and available online.

Visit: <https://www.dropbox.com/plans>



An Equifax Credit Score is a summary of an individual's credit information held by Equifax. It indicates how credit providers and finance or utility providers may view you when you apply for credit. An Equifax Credit Score is derived from the information on an individual's credit file at a specific point in time.

Visit: <https://www.equifax.com.au/personal/>



Esendex provides a portfolio of services that enable the sending and receiving of SMS via the web or email services. They also offer an SMS API that facilitates the integration of SMS services with business systems.

Visit: <https://www.esendex.com/home>



Google Docs is an online word processor included as part of the free, web-based Google Docs Editors suite offered by Google.

Visit: <https://docs.google.com/>

LastPass

LastPass is a premium password manager that stores encrypted passwords online. The standard version of LastPass comes with a web interface, but also includes plugins for various web browsers and apps for many smartphones.

Visit: <https://www.lastpass.com>



Microsoft Teams is a proprietary business communication platform developed by Microsoft, as part of the Microsoft 365 family of products. Teams offers workspace chat and video conferencing, file storage, and application integration.

Visit: <https://www.microsoft.com/en-au/microsoft-teams/log-in>



myCRM is an aggregator software providing digital technology and platform solutions to brokers.

Visit: <https://mycrm.finance/login>

Bank Connect is another app in myCRM that is similar to Bankstatements.com.au, allowing users to collect statements and analyse expenses.

Visit: <https://myCRM.finance/>



Nitro is a powerful and affordable PDF and eSignature solutions software that transforms the way you work with documents.

Visit: <https://www.gonitro.com>



Notability is a note-taking application for iOS and macOS. The application allows note-taking and the annotation of PDF files.

Visit: <https://notability.com/>



Office 365 is a product family of productivity software and cloud-based services. It encompasses online services such as Outlook.com, OneDrive, Microsoft Teams, Word, Excel, PowerPoint on Microsoft Windows, macOS, mobile devices, and on the web.

Visit: <https://www.office.com/>



OneDrive is a file hosting service operated by Microsoft.

Visit: <https://onedrive.live.com/>



Quickli gives a broker everything that's needed to remove the headache from serviceability and policy checks.

Visit: <https://quickli.com.au/>



Trello is the visual tool that empowers your team to manage any type of project, workflow or task tracking.

Visit: <https://trello.com>



TryCall is an automated calling and messaging platform. TryCall allows you to connect with thousands of customers in minutes! The platform is completely web-based and no software or hardware is needed.

Visit: <https://www.trycall.com.au/>



Microsoft Whiteboard

Microsoft whiteboard helps keep track of your pipeline using a simple visual process.

Visit: <https://whiteboard.office.com/>



Zoom's secure, reliable video platform powers all of your communication needs, including meetings, chat, phone, webinars, and online events.

Visit: <https://zoom.us/>

If you'd like more information, please contact our team:

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